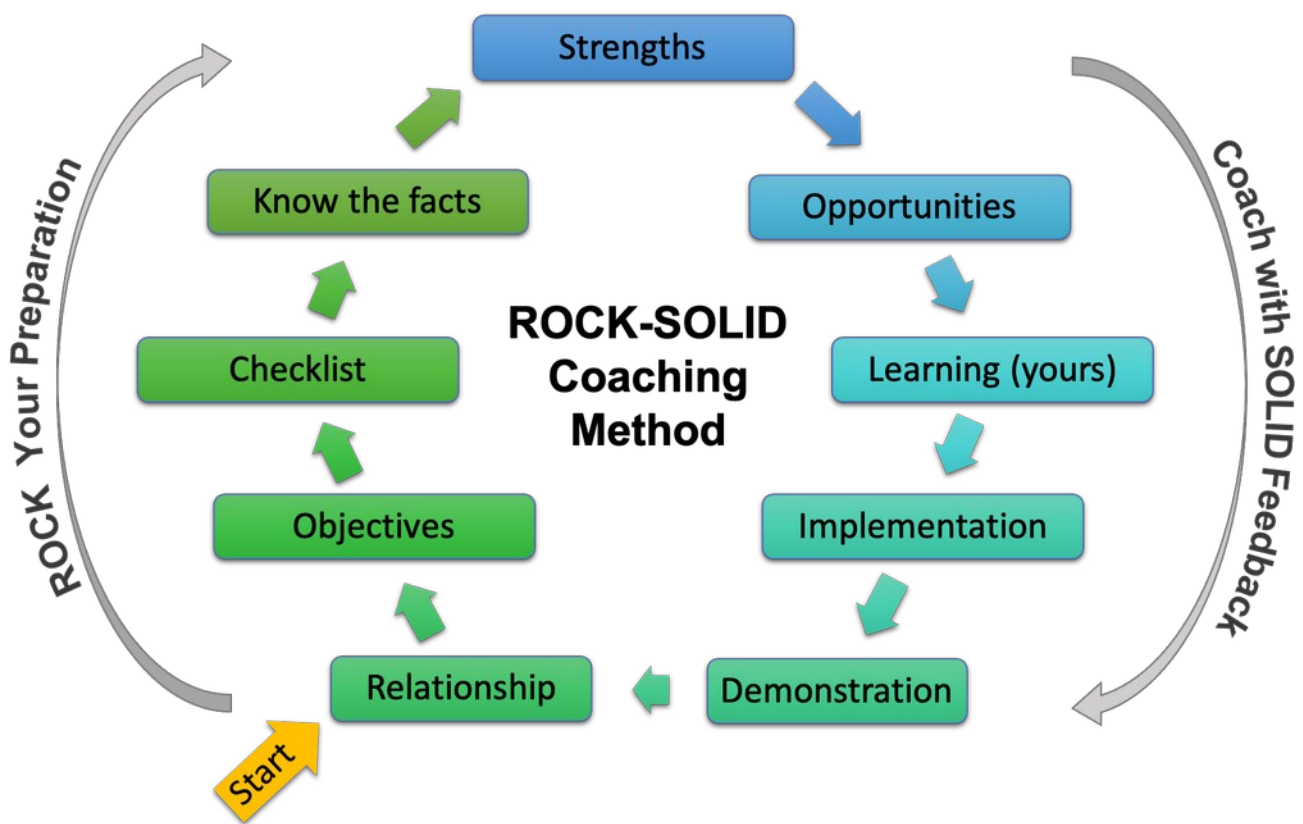


UMGC's Faculty Guide to Coaching with the ROCK-SOLID Coaching Method (RSCMG)



By David Leasure with contributions from Susan Aceti, Erica Ellsworth, and Marsha Fortney

May 5, 2021

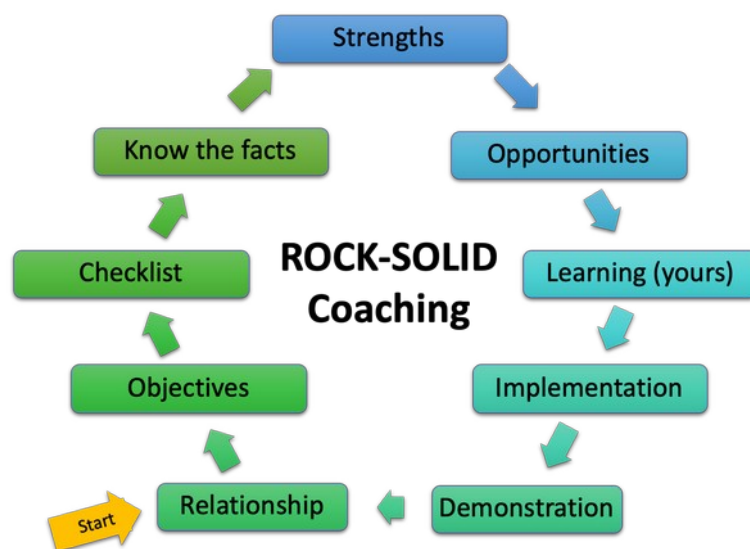
ROCK-SOLID Coaching Method Guide (RSCMG)¹

Reading Time: 30m-45m

This guide contains the tools and tutorials for using the ROCK-SOLID coaching Method (RSCM) on a regular basis.

Use the RSCM to prepare *welcome and impactful* feedback. The method allows you to adjust the level of effort you make to fit the objectives of your coaching. From quick, lightweight coaching given in class to coaching given to a medical practitioner for a life-threatening performance. The method applies equally well to providing written feedback on assignments and interactive coaching a student's problem-solving of a personal situation.

The method includes the steps shown in this graphic:



The video, **Overview of the ROCK-SOLID Coaching Method**, provides a general explanation of RSCM.

The video, **Using the Rock Solid Coaching Method (RSCM) in a Course** shows how students and coaches can integrate the RSCM into any course.

Each step in the diagram above is described below. You may click on the links to develop a deeper understanding.

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Preparing to Coach with ROCK

- **R-build a positive and trusting Relationship** to amplify the value of coaching; create relationships from the beginning of a course and maintain them throughout
- **O-set the Objectives for coaching a performance** to guide the coaching to achieve the goals desired by the coach and performer
- **C-create or obtain a Checklist for the performance** that can be a shared definition of quality to guide a learner's performance and the coaching that follows
- **K-Know the facts of the performance** being coached including the personal and environmental context in which it takes place

Coaching with SOLID

- **S-identify the Strengths** of a performance by a performer so the contribution of the strength is understood, reinforced, and available to repeat in the future
- **O-describe Opportunities** the performer has to impact future performances by improving skills or knowledge such as changing one's process or adjusting some aspect of the performer's or performance's context
- **L-share Your Learning and gratitude**]] to honor the performer by recognizing their role in teaching you, to model learning, and to improve your own performance as a coach
- **I-Implement a learning plan** with the performer that will result in future, higher quality performances through learning, skill development, and/or managing their performance environment
- **D-Demonstrate that the performer has developed** and is able to perform at a higher level

Coaching Tools

Use these tools for your coaching. The methods outline the steps to take. The checklists help assess the quality of your coaching performance to support your self-coaching of using the RSCM. And blank forms may be used to record information needed for coaching.

- **Coaching Checklist** - provides a quality guide for the coaching process that supports your self-coaching
- **SOLID Coaching Form** - organizes your feedback each time you coach
- **Being Trustworthy Checklist**
- **Method to Establish a Positive Relationship**
- **Method: Know the Facts of a Performance**
- **Know the Facts Form**

Implementing Personal Development

Sometimes the change we need in our lives is a major departure from our current selves. We can see that in the many failed “New Year's Resolutions.” The **WOOP+SOL Method** is a research-based approach that has been shown to be much more successful when changing habits or accomplishing other substantial personal development. It can be used in the **I**-implementation step of RSCM.

Frequently Asked Questions

This guide does not cover every situation. Some situations are common enough that they're listed in the **Frequently Asked Questions** section. For other situations, gathering as many facts as you can and engaging your creative problem solving will see you through.

Lookup a Term in the Glossary

Many of the terms used in the RSCM may seem familiar, yet have a specific meaning in the method. The [Glossary](#) has the definitions of many of these.

Overview of the ROCK-SOLID Coaching Method

Video (7m33s)

View on youtube: <https://youtu.be/6GZcrHnpMas>

Video Transcript (5m9s)

00:02

Hi, I'm David Leasure. And I'm so glad to be with you watching this introduction to ROCK-SOLID Coaching.

00:12

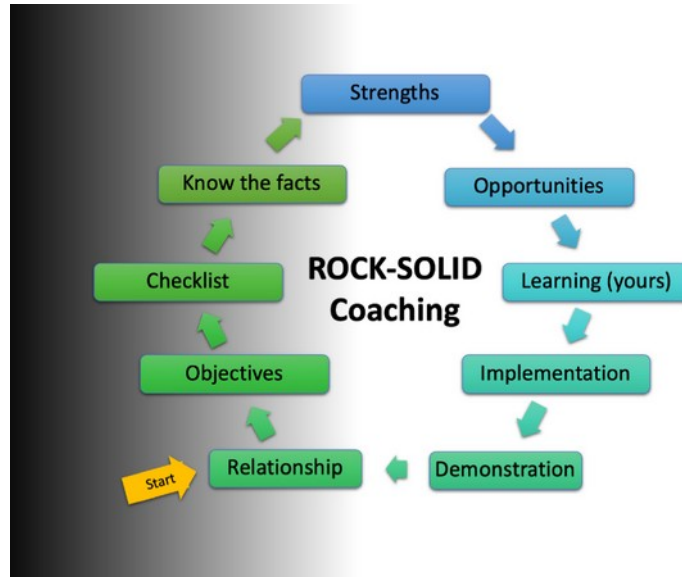
Have you ever been in a situation where you're being reviewed by somebody, judged by somebody, and find yourself just unable to really listen with an open heart and open mind to the feedback you're getting?

00:30

You know that you're just hurting. Maybe you're embarrassed. And the feedback is going right past your ear, and out into space. It's just not going to make any difference right now, because of the way you feel. And if you can imagine the roles reversed, and you're trying to give feedback to someone, and you want to have them walk away, feeling good about themselves, feeling eager to try something new, and to act on your feedback, then ROCK-SOLID Coaching is for you. It's a method of giving welcome and helpful feedback that at the same time reinforces a growth mindset and sustains a trusting coaching relationship.

01:26

Now, “ROCK-SOLID” is just a mnemonic to help you remember all of the steps. There are nine steps. There's a preparatory phase, which consists of the first four of the ROCK steps, and a coaching phase, which is the last five, which is the SOLID steps. And we'll talk a little bit about all of them as we go through here.



01:52

So let's talk about that preparatory phase, the ROCK, so that you can rock your coaching, okay? It starts with establishing a positive and trusting relationship with the people that you're going to be coaching. And that's because when you give feedback, you want them to know that you have their best interests at heart and that you really care about them. And that you care about helping them to improve their performance.



02:26

You also want to share the objectives of the coaching so that they know what the coaching is for.

02:32

And in particular, a checklist of quality that will help them guide their own performance, as well as be the basis of a conversation that centers on the process that creates the outcome, rather than the person, so that they're invested in creating as much quality as possible out of their performance, because of the way that they do it.

02:57

And they're learning about it as well as you are coaching. And then right before you deliver coaching, you want to know the facts of the situation, the facts of the person you're coaching, and their circumstances and the performance that you are reviewing, as well as the facts of the performance itself so that you can give accurate, helpful, fair, and timely feedback.

03:32

So when you deliver that feedback, you want to do it in a SOLID fashion. We cover the strengths first because people love to hear about their strengths, what did I do that produced the quality? And what can I do in the future that will help me the same way? So you want to reinforce the strengths. And not only that, but explain how they worked so that there's learning being done about the strengths and how to achieve them.



Deliver SOLID Feedback



04:02

Next, with that positive energy built up, you can go into a description of the opportunities. And I call them opportunities instead of improvements. Because the person can take them or leave them. They're opportunities that you see that will help improve their performance. They can try them. They can modify them. They can ignore them. So it's really your best advice as a coach.

04:32

And then I find it helpful to share the learning that I've done going into the situation because if I look for learning from the very beginning in a coaching situation, I find that much more open minded to understanding what was going on in the mind of my learner so that I can better coach them and more honestly appreciate what it is they're trying to do with the performance.

05:02

Then I like to work with them, and ask them what they want to do to improve their learning and improve future performances. And that helps me understand how they interpret my feedback, as well as empowering them to take control of their own learning.

05:22

And then we set a time for a demonstration of what learning they've done, but puts a little bit of pressure on the situation and the expectation that I'm looking forward to seeing what they can do.

05:37

Finally, I just want to sum it up. ROCK-SOLID Coaching is a method of giving feedback. It starts with trust, it builds trust, and it sustains trust in the way that it's done. I never want to destroy the relationship. in service of the coaching; I want the coaching to serve the development of that person. And the relationship is part of that. I avoid judgment when I do that, because nobody likes to be judged; they want to be helped. I build on their strengths. It's a strength-based philosophy that you can build your strengths more quickly and solidly, then you can your deficits. And the deficits tend to put learners in a negative mindset. And so that turns off learning altogether. So we want to avoid that.



06:33

It nurtures that growth mindset that it's okay not to do things perfectly and

that through hard work and feedback and coaching and then more hard work, you can learn and become capable of doing almost anything. And that in itself, being the one in charge of doing that, is what builds [learners'] self-confidence and self-efficacy. And results in positive improvements that are reflected in the future performances of your learners.

Using the Rock Solid Coaching Method (RSCM) in a Course

Time: 3-5m

The RSCM can be adapted for use in any coaching situation. When you can plan in advance to use RSCM in a course, it is easier to learn and grow your coaching skills.

Watch the following video or read its transcript describing how the method can be added to a course.

Video (5m)

Watch on youtube: <https://youtu.be/q2zDymTngEY>

Transcript (3m)

00:00

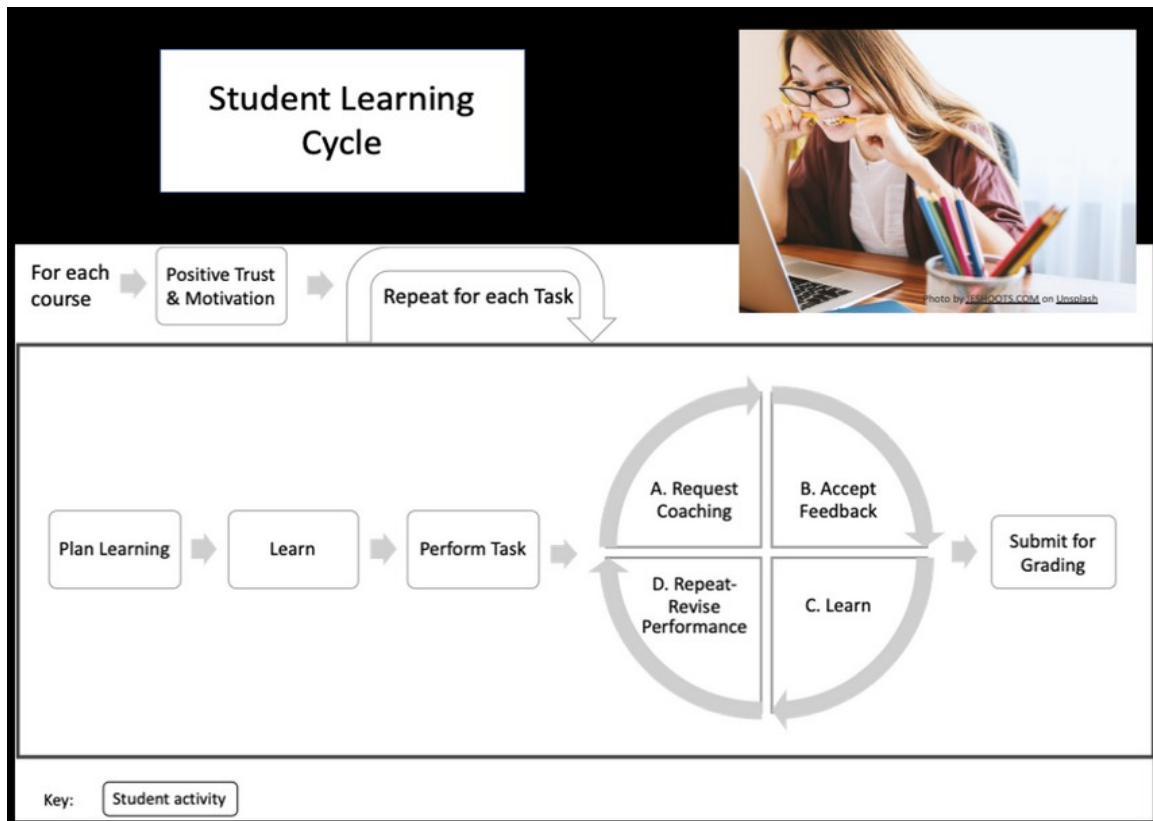
ROCK-SOLID coaching can be used with the normal student learning cycle. So let's take a look at how that cycle functions so that we can then look at how we overlay ROCK-SOLID on top of that.

00:17

Typically, student learning is done through courses. And so for each course, the student participates because there's an atmosphere of trust, and motivation and the student has some responsibility in that too, to bring trust and to self motivate. The instructor has some responsibilities to create that as well.

00:46

And then a course consists of a series of tasks that students have to do, and they repeat this same cycle for every task that's going on here. You can see that they plan their learning. Often the instructor gives them quite a bit of help in this regard or direction.

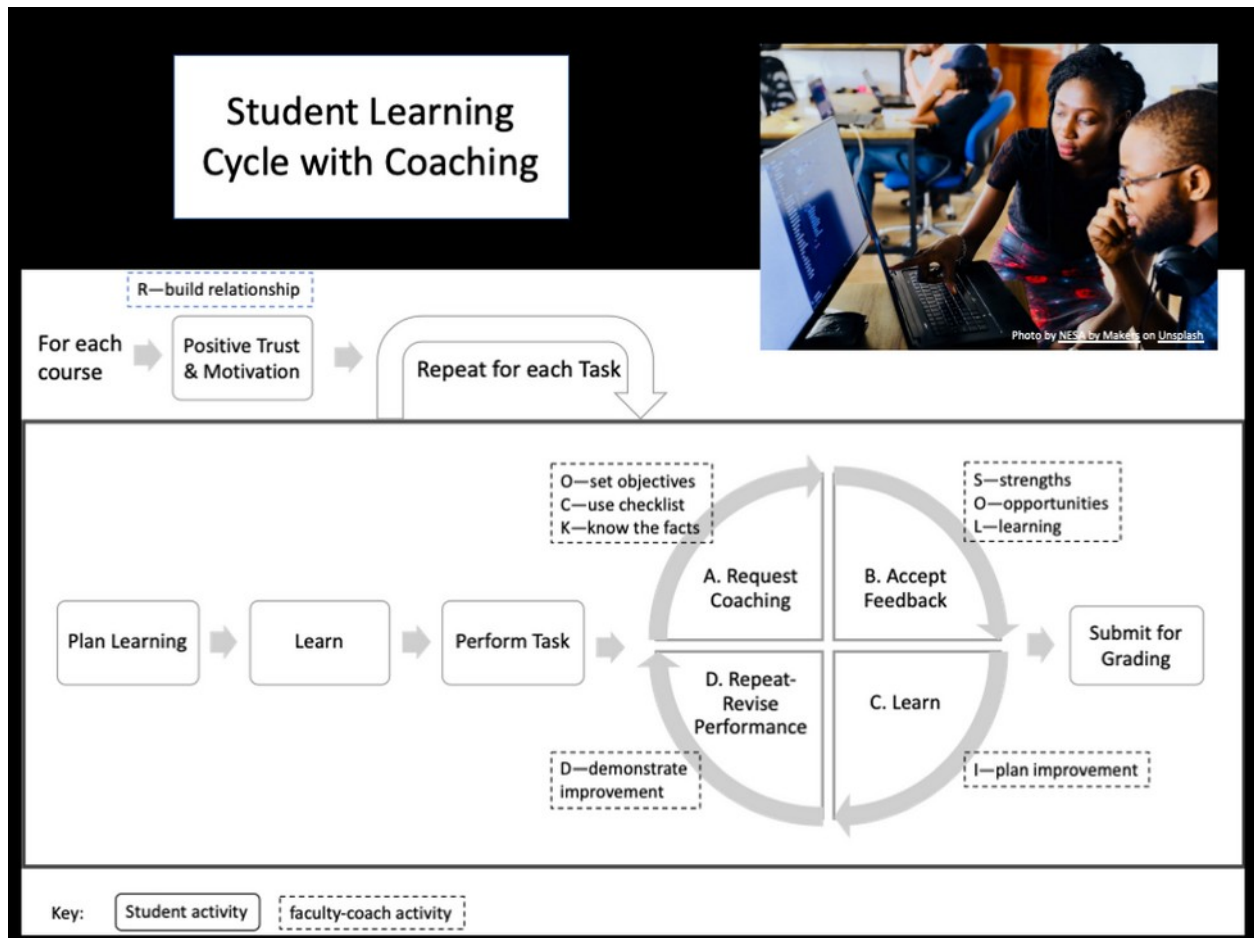


01:09

They do the learning. And often there's some sort of task to perform or deliverable to provide that shows that the student learned. And so what we see here with coaching is that the student, in performing that task, can request coaching, prior to submitting for a grade, and then be willing to accept that feedback from the coach. As they do that, learn what opportunities they have to improve their learning. And then repeat they can demonstrate this performance and repeat and go back through the cycle until they feel like they're ready or they're of time, and then they can submit for grading. This is essentially what the student is involved in, in this setting.

02:15

When we look at the student learning cycle with coaching, it's the same cycle. But now in the dotted boxes, we're going to overlay ROCK-SOLID on top of it. And you can see that we have the responsibility here for building the relationship as at the same time, or a little ahead of time that the student is also developing trust and motivation. And then for each task, we have the student doing their learning, or their planning, the learning and then performing. As the coach is preparing to coach, there should be a clear understanding of what coaching would do at this point, what are the objectives. Obviously to improve the learning that's occurring in the classroom on this task. Develops a checklist of what quality would look like for this task. So ideally, sharing that checklist with the student. And then when this task is performed, investing the time as a coach to know the facts around that task and be able to respond to that request for coaching.



03:42

And in that request, again, once the coach knows the facts, develop the set of strengths that one sees the two to three strengths, the two to three learning opportunities and the learning that the coach has done themselves. Then provide that feedback to the student and work with the student to let them build a plan for improvement but coach them along the way on their learning skills in their planning skills. And then set a time out there for demonstration of improvement. And then this can repeat as often as needed, or until time runs out. And when time runs out, you just have to call it and say yeah, it's time to submit for grading, which is a different activity than coaching.

R-Build a Positive and Trusting Relationship

Time: 10m45s

We coach to make a difference. The receptivity of a learner to feedback greatly relies on establishing a relationship prior to giving feedback. The R step of RSCM helps you establish and maintain your relationship with those you would coach.

Sometimes, it's not possible to build the relationship in advance, so it must be built on the fly. This can occur in a one-time coaching situation, such as when coaching outside of a formal course. The principles still apply in this situation but delivered in a compressed, and simplified form.

At a minimum:

- Open coaching with a positive observation that maintains or even builds on the existing relationship
- Confer with the learner to gain their cooperation and readiness, if situationally possible
- Ask questions, if possible, to ensure you understand before trying to be understood
- Close coaching with an expression of confidence in the learner's ability to make *these* improvements

A more comprehensive approach is reflected in the tools below.

Tools

- **Establish a Positive Relationship Method** lists the steps you can take to build relationships in the course. Modify to meet your needs.
- **Being Trustworthy Checklist** lists the qualities and behaviors that maintain trust, which is the foundation of a positive relationship.

Video (9m36s)

View on youtube: <https://youtu.be/l0jzz87FcB0>

Video Transcript (5m40s)

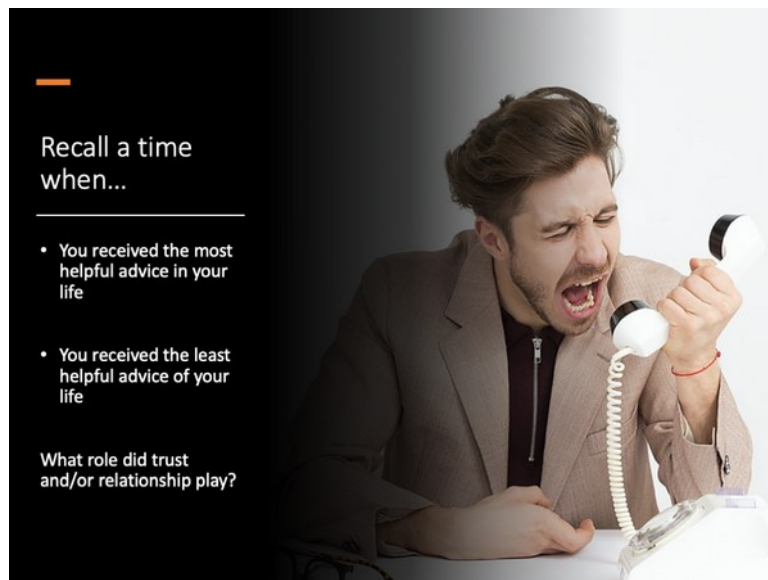
Slide 1

Hi, I want to talk to you about relationship, building relationships with your students as the foundation for rock solid coaching.



Slide 2

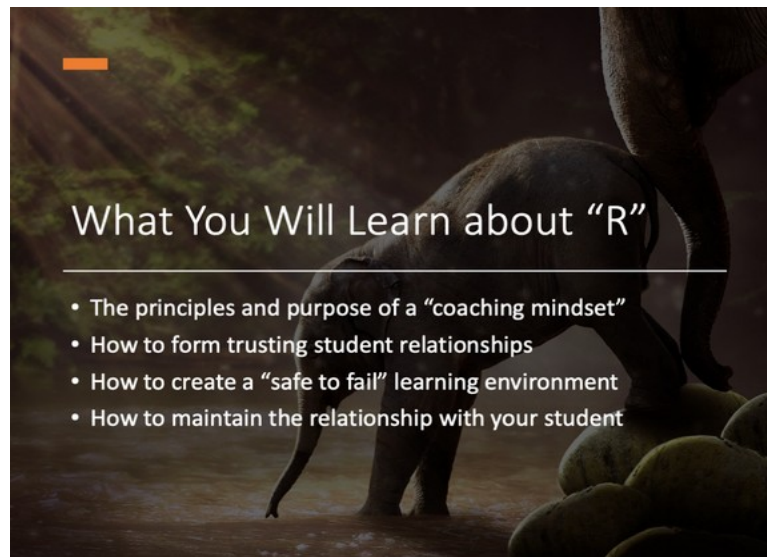
To begin with, let's do a little thought experiment. I want you to recall a time when you receive the most helpful advice of your life. What did that feel like? How did it happen? Who was it with? Did it make a difference? Now, I want you to think about another time when you receive the least helpful advice of your life. Was that helpful? Now what role in both of these situations did trust in the relationship play a part? I'm going to guess that the more you trusted someone, the more likely you were to use their feedback. And that's true of our students too.



Slide 3

So what will you learn in this module in the course, you'll learn about the principles and purpose of a coaching mindset, what you need to bring to the relationship building in order for it to be effective. And also just an amazing

part of this new relationship you're going to build with students, how to form those trusting relationships. And even create an environment in which it's safe to fail, so that the student isn't holding back in their attempt to learn something new. Because they know you're going to be there. Instead of judging them, you are going to give them some coaching that will help them improve the next time they do it. And then how over the long haul of the course, you maintain that relationship or even build on it, so that it's there when you need it.



Slide 4

An important part of trust is maintaining a positive mindset. Now a negative mindset or a negative emotional state. They've done fMRI studies and a negative emotional state results from fear or a sense of being judged or judging yourself even. It stimulates the flight or fight response or even the self critic. It closes down new learning because it shuts off neuronal growth. No more brain cells, no more connections. Between your brain cells, while this is going on, and it pairs with a fixed mindset, which pairs with the self-critic too, “I'm not good at this”, “I can't do this”, “I'm not going to try”, “I'm not going to take risks.” On the other hand, a positive emotional state results from thinking about the possibilities you have for your future or thinking about yourself, and what they call autobiographical thought. This, on the other hand, from contrast with the negative state supports neuronal growth and learning new connections between brain cells, new cells and your hippocampus. It creates engagement. People want to be part of the learning and they put themselves into it, they put effort. They're there, they put time in pairs. extremely well as the foundation of a growth mindset. The belief that you can grow anything, you can learn anything, if you just put yourself in the situation and apply yourself and do it.



Positive vs. Negative Mindsets

A negative emotional state

- Results from fear or being judged
- Stimulates flight or fight
- Closes down neuronal growth
- Pairs with a Fixed Mindset

A positive emotional state

- Results from possibilities for self
- Supports neuronal growth
- Creates engagement
- Pairs with a Growth Mindset

Slide 5

Within rock-solid, there's a coaching mindset. And it starts with the belief that everyone can learn. Benjamin Bloom said this back in 1968, that everyone can learn what's the proper support and conditions for learning. So the mindset includes those conditions, maintaining a positive build for future mindset. You know, the students aren't going to end their lives in your course. So prepare them for what happens next. They believe in themselves. How do you get that because you believe in them, you show them that you believe in them. You have clear, challenging, and doable expectations for them, make it very clear to them and you remind them, but you also know that you can help them through that. And they know that as part of the trust, you permit them to fail, that you protect them from harm. You want them to stay positive, energetic, self-confident, and move forward. It's called productive struggle. You know that the performance is what results from the process they use, in other words, what they produce for you to grade by the end of the course, results from the process they use to create it.

And when you're coaching, you're not judging the person. You're looking at the process they use and suggesting improvements for that process as you go along. That helps them distance it from personal judgment. And they can join in and help you debug that process and get it working better. And they always will receive the conditions and support in terms of helpful and encouraging coaching. Again, I asked you to think about in all of this mindset, what's the role of the relationship? Do you need a relationship in order to have a safe environment to fail? You need a relationship to give encouragement and helpful coaching to be interpreted as helpful.

ROCK-SOLID Coaching Mindset

All students can learn and can improve their learning performance with the right conditions & support

- Maintain a Positive, Build-for-Future Mindset
- Believe in themselves because you believe in them
- Have clear, challenging, & doable expectations
- Permitted to fail and protected from harm
- Know that performance results from their process
- Receive helpful and encouraging coaching



What's the role of relationship in achieving this mindset?


Slide 6

So here're some tips on building and maintaining that relationship. So again, be positive, always be positive, doesn't mean be happy or giddy, just be positive and view things in a positive way. Open up the possibilities in people's life.

You can avoid any preconceptions, by the way they look or what their names are, or things that you've thought about students who disappointed you in the past, give them a fresh start and refrain from judging them. Everyone knows when they're being judged and what happens, they go into a negative mindset. So, another thing you can do is to express your sincere commitment to supporting their success. They have to create the success that you create the conditions and support for that success. You want to, that's what you want to tell them, you show them that that's what you do. And you can post a bio about yourself and make that clear in the bio can have them post bios and interact with each other to build strong social relationships. And you can comment on their bios and become more personally caring of what it is and who they are. You can hold office hours in a personal way with video. You can hold zoom meetings, one on one, give coaching via video. All of it makes it more personal and makes it more possible to build that relationship.

Building & Maintaining the Relationship

- Be positive
- Avoid pre-conceptions & judgment of individuals
- Express sincere commitment to support success
- Post a self-bio and interact with student bios
- Hold office hours & other zoom meetings
- Be trustworthy



Slide 7

And you maintain that relationship by being trustworthy. Trustworthy is another subject in and of itself. You can coach yourself have become more trustworthy than you are now. And often, it's not that you're not trustworthy, it's that you haven't communicated it to others, so that they believe that you're trustworthy. And so look for this download in your course and use it to run through and say these are the qualities and behaviors that I can use to become trustworthy. So go out, build those relationships, and keep coaching.

Coach Yourself:
Being Trustworthy

Use the *Trustworthy Checklist* download →



Access the
Being Trustworthy Checklist.

Being Trustworthy Checklist

The following checklist, adapted from Covey and Merrill's book *The Speed of Trust*, may be used to assess and develop your trustworthiness (2006). This is not a method, because the steps are not necessarily sequential. You may use it to suggest behaviors you need to start or to improve. These items can be coachable with your students, as well.

?	Quality
<input type="checkbox"/>	Integrity—are your actions aligned with your values and beliefs?
<input type="checkbox"/>	Intent—are your motives transparent and in the interest of both parties?
<input type="checkbox"/>	Capabilities—does your expertise, your experience, knowledge, skills, and mindsets, support you in the role you play in the relationship; said another way, <i>can you deliver what you promise?</i>
<input type="checkbox"/>	Results—do you deliver the results that you intend to deliver and keep the promises that you make?
?	Behavior
<input type="checkbox"/>	Tell the truth, simply and honestly
<input type="checkbox"/>	Demonstrate caring and respect
<input type="checkbox"/>	Create transparency by being open
<input type="checkbox"/>	Right your wrongs by apologizing and correcting them
<input type="checkbox"/>	Show loyalty by acknowledging contribution and being discrete otherwise
<input type="checkbox"/>	Deliver timely results that exceed expectations
<input type="checkbox"/>	Improve yourself by accepting challenge, practicing, and seeking coaching and feedback
<input type="checkbox"/>	Be forthright and courageous in addressing issues head-on
<input type="checkbox"/>	Clarify expectations to avoid disappointments and frustrations
<input type="checkbox"/>	Practice accountability for yourself and others, accepting and dealing with consequences
<input type="checkbox"/>	Listen first with an open mind, ask questions to discover more, and confirm your understanding by paraphrasing
<input type="checkbox"/>	Keep your commitments and provide updates, whether good or bad, on progress
<input type="checkbox"/>	Assume positive intent and extend trust with others
<input type="checkbox"/>	Act in the best interests of the students, yourself, and the university

O-Objectives for Coaching the Performance

Time: 4m

Knowing what you and the learner want to achieve going into a coaching situation helps guide the coaching. Like many things in life, a coaching session can unfold in ways you don't expect, and having your objectives in mind helps you to adapt to the situation.

- For an assignment, decide which learning objectives apply
- For a *live*, problem-solving coaching, you may want to use these objectives:
 - Discover and define the problem to solve by answering the coaches questions
 - Coach the learner's problem-solving and planning skills
 - Coach the learner to have confidence and an open mind
- Minimize the objectives down to the most important aspects and don't spend time on lesser outcomes
- When coaching situations, the objectives may change as you learn more information; be flexible
- Know your priorities for your objectives as some coaching situations unravel and the principle objectives achieved none-the-less
- Always include the following:
 - Develop learning and problem-solving skills
 - Build on the existing positive and trusting relationship
 - Determine what could most help the student develop
 - Discover the true source of the challenge
- Resist lecturing or **preaching** and stick to outcomes which help and will result in a lasting change

Video (2m33s)

Watch on youtube: <https://youtu.be/-u9hRAxV9aE>

Video Transcript (1m50s)

00:00

Hi! With a relationship established, you can make clear what the objectives of coaching are. Partly, this is for you, and partly it's for the student.

00:14

“What situation are you coaching?” is the question you want to ask. Is it an open-ended assignment, closed-ended assignment or even a non-curricular problem-solving situation like a problem at work or or some kind of financial situation or other challenge that will prevent a student from being able to learn?

ROCK your Coaching

- R** Positive Relationship
- O** Objectives of Coaching
- C** Checklist of Quality
- K** Know the Facts

What situation are you coaching?

- Open-ended Assignment?
- Closed-ended Assignment?
- Non-curricular Problem-Solving
- Special Request

Do you know what you want from the coaching?

Does it need to be shared?

00:41

In any of those situations, you have to make clear what it is that the coaching is for.

00:47

Again, in that problem solving non-curricular situation, what you try to do is coach the students on their own problem solving, so that they strengthen themselves, and then know what to do to resolve the challenge that they have. It could be, of course, introducing them to some of the services of the university, but that's part of their problem-solving solution set.

01:15

For a closed ended assignment, like something that just has a right or wrong answer, the objectives of coaching are really just to look at how the right or wrong answer was developed and to reinforce that.

01:32

Where coaching really shines is in the open ended assignment that allows the student to really exercise their skills, and their abilities and creativity, to show what they're capable of, and then you as a coach have an opportunity to really recognize the unique strengths that the student brought to the situation and to suggest opportunities for the future that really will elevate the students performance.

02:05

So, do you know what you want from the coaching? You need to be able to answer that and ask yourself does this really need to be shared with the student what my objectives are?

02:21

And most of the time, it just takes a simple statement of what it is that coaching does in that situation.

C-Create or Obtain a Checklist for the Performance

Time: 2m30s

Performance coaching uses a checklist or rubric to measure the quality of a learner's performance. Like a doctor's surgical checklist or a pilot's pre-flight checklist, it can guide the needed steps that lead to quality. The checklist is a simplified version of a rubric that allows coaching to move forward when no rubric has been created.

A quality checklist is a list of observable actions, thoughts, and feelings that are required to improve quality. The more items that are checked, the higher the quality.

Checklists are best to not keep secret as they align the coach and performer to a shared understanding of performance quality and encourage the learner to self-coach.

- List the most important features of quality for the objectives you've chosen to coach
- Share with the learner to empower them to self-coach their own performance
- Cover both the process & product so that the steps needed to produce quality are followed and produce the desired quality in the end-result

Video (1m28s)

Watch on youtube: <https://youtu.be/S8IYPA-BeWQ>

Video Transcript (66s)

00:00

Once you've settled on the objectives of coaching, you can proceed to the checklist of quality. A checklist of quality is a guide for you as the coach and for the performer, that you're going to coach because it contains the steps at a high level that are needed to produce the performance or the deliverable that is the assignment in the case of a course, with the [primary] qualities that the deliverable has to have.

ROCK your Coaching

- R** Positive Relationship
- O** Objectives of Coaching
- C** Checklist of Quality
- K** Know the Facts

A Checklist is 1 or both

- Steps to Produce Deliverable
- Qualities of the Deliverable

A Checklist is

- Created by Coach or Performer
- A simplified Rubric
- Shared
- Basis of Feedback

00:38

A checklist is simple. It shouldn't be complicated like a rubric with multiple levels and everything. It should just remind the student of what's necessary to be done and at what level to think about having it done.

00:56

You create it or if you're a performer and you have a coach that doesn't create it for you, you can create it yourself. So a simplified rubric is ideally shared between the coach and the performer. And it forms the basis of the feedback. It frames that conversation and is very useful.

01:18

So make a simple one and share it with the people you're going to coach.

K-Know the Facts of the Performance

Time: 7m45s

Before you can deliver feedback on a performance, you need to know the facts. You can obtain the facts by reading an assignment, watching a performance, or asking questions of the performer. The facts include the expectations for the performance, the conditions and constraints of the context, the condition of the performer, the performance result, and the measured quality of the result.

- Analyze the context of the performance and conditions of the performer
- Review the process used by the performer (if available)
- Review the performance result. As you review, keep a list of the strengths, opportunities, and learning discoveries.

The video below describes a form of K-Know the Facts to use in most situations. For your most complicated coaching situations, use the tools that follow.

Tools

- **Method: Know the Facts of a Performance**
- **Know the Facts Form**

Video (4m31s)

Watch on youtube: <https://youtu.be/fi6NqoBVVx0>

Video Transcript (3m16s)

00:01

Know the facts is the transitional stage between preparing for coaching, and actually coaching. It's both understanding what it is you need to know in order to do a good job of coaching someone, as well as analyzing the performance and understanding how those expectations work to create the feedback that you're going to give in the coaching part.

00:32

So, upfront, you want to look at the task. You want to look at the conditions that the task will be performed under and within the performer. And then you want to look at the performance and its results. Going into the task, you need the expectations which are captured in that checklist of quality. You need the knowledge that the performer needs. In other words, you need to know what it is so that you can coach them if that's what's missing from the performance. The skills that they have and using that knowledge and any professional identity or required ways of being that will help them perform in that role. For example, for patient care, nursing students use the professional identity of a nurse.

ROCK your Coaching

- R Positive Relationship
- O Objectives of Coaching
- C Checklist of Quality
- K Know the Facts

Expectations of the Performance
 Knowledge Needed for the Performance
 Skills Needed for the Performance
 Required Ways of Being
 Context of the Performance
 Personal State of the Performer
 Fixed Limitations of the Performer

A trace of the performance
 The result of the performance
 Assessed Quality of the Performance

Photo by Ali Hajian on Unsplash

01:29

Then you want to look at the conditions that the task will be performed under, which is the context of the task is happening where it's normally happening or is it somewhere more challenging? For example, are you now in a crowd of people having to do something versus you always practiced in a controlled environment or looking internal to the performer as a performer, you know, ready to go, or tired, sleepy, in pain, worried about something else going on? So you have to know what is happening with the performer as well. And sometimes you don't know that until you actually get into coaching. And through an interactive process can pull that information out of the performer.

02:22

And any fixed limitations the performer might have in terms of maybe too short to play as the center of the basketball team, when the opponents are all seven feet tall. So it's not that that a thing you can coach and change, but you can help the performer adapt to those limitations and create strategies that are effective.

02:48

And finally, there's the actual performance itself, which may be something the performer does like a dance or theater acting, or something like that. Or it could be the result of the performance. So there's a writing performance that results in an essay, that's going to be the basis of most of what you coach.

03:12

But to do the best job of coaching, you have to get inside of how that result was made. So you would be well off to have a trace of the performance, what steps did they go through? What does that result look like? And using the checklist of quality, what is the assessed quality that you give that performance or result so that you can talk about what are the opportunities that would make that result even higher in quality?

03:46

Or what are the strengths that actually produce the quality that you see? This all sounds pretty complicated, I'm sure. But as you get used to doing this, you'll get better. Having all of those things present when you're coaching, and it will be that experience that you rely on.

04:08

And if you're in a teaching situation, then you do this analysis of the task once and apply it many times to the 2025 students who are in your course and all needing individual coaching on the result that they produced.

Know the Facts Form

Copy the contents below into a fresh file.

Date

Performer

Performance

Coach

Expectations of the Performance

Knowledge Needed for the Performance

Skills Needed for the Performance

Ways of Being, either Helpful or Required for the Performance

Context of the Performance

Personal State of the Performer

Fixed Challenges of the Performer

Assessed Quality of the Performance

S-Identify the Strengths of a Performance

Time: 3m10s

Begin feedback by listing the strengths you observe in a performance. Starting with strengths helps preserve the positive relationship and mindset of the performer. We analyze the process and products of the performance using the checklist to identify strengths.

- Select the 2-3 strengths from your list that contributed most to the quality of the performance and will do so again when repeated
- Describe the strengths in sufficient detail to allow them to be repeated in future performances
- Focus on the efforts and actions that produced quality, not on judging the quality
- Provide a rationale for each strength to explain its impact
- As you communicate, avoid praise or criticism, as both are forms of judgment; doing so preserves the performer's receptivity to the feedback
- Citing evidence ensures accuracy, authenticity, and makes it easier for the performer to recognize their contribution

Video (1m44s)

Watch on youtube: <https://youtu.be/tQ9tTNsvFoU>

Video Transcript

00:00

Once you have done the “Know the Facts” part of the ROCK, it's time to take that analysis and turn it into a conversation with your learner that you can coach.

00:19

And we start with S-Strengths because everybody loves to hear what they did well. They love to hear and think about what it is they did well, but we want to get more out of it. As a coach, we actually want to get the best things that the learner contributed to the quality of their performance, and have them understand what it is so that they can repeat them in future performances and get that similar quality produced.

00:49

And they're often not aware of what those strengths are. So we have to be explicit about it. In order not to overwhelm them. I try to do [list] two to three strengths that produce the greatest contribution to the quality that I see in their performance. And when I do that, I want them to be aware of it.



01:10

So I talked about what was done and why that's a strength. So I like to give evidence tied right to that so that they it's not an abstract concept, but something very concrete for them, why it's a strength and how they did it so that they can do it again. And [they] become aware of it and are able to ensure those strengths are part of future performances.

O-Describe the Opportunities

Time: 2m45s

Opportunities are not flaws; rather, they are the ways the coach sees to best strengthen a future performance.

- Select the 2-3 opportunities from your list that could contribute most to the quality of a future performance and which are doable by the learner after improving some aspect(s) identified in step 1
- Describe the development necessary for each opportunity in sufficient detail to allow the performer to make the needed improvements
- Justify the opportunity, describing what it would add to the performance quality
- Phrase an opportunity as a way to strengthen the performance rather than a weakness or a gap (that would sound like grading)
- Only list opportunities that will make the biggest impact to limit the complexity and then coach again
- Confirm the learner understands the positive nature of the feedback

Video (1m55s)

Watch on youtube: <https://youtu.be/ChfywxV-dY4>

Video Transcript (1m33s)

00:01

During the strength part of coaching, we're very careful to present that first so that we can maintain the excitement and positive mindset that a learner needs in order to actually pay attention and learn from the feedback you're giving them.

00:17

We want to continue that when we talk about the opportunities. And let's look at what Maya Angelou said, which is "Let nothing dim the light that shines from within."

00:29

We don't want to do anything that will actually dampen the enthusiasm. And most people cannot process negative feedback in a positive way. That takes a lot of self-confidence, self-efficacy and practice.

00:44

So what we want to do is frame our changes that we'd like our students or learners to make in a very positive way as opportunities. It doesn't flinch from telling them what they need to do, but it focuses in a way that looks at the future rather than the past.



Photo by [Allie](#) on [Unsplash](#)

Coaching Opportunities

- S** Strengths
- O** Opportunities
- L** Learning (yours)
- I** Improvement plan
- D** Demonstration

An opportunity improves *future* performances

Give the 2-3 most impactful and learner-doable opportunities with details:

- What to do
- Why to do
- How to do

Let nothing dim the light that shines from within. ~Maya Angelou

01:07

One of the things that's challenging about giving negative [or corrective] feedback, is it often refers to something that's already happened, that really no one has the opportunity to change. But we're talking with our feedback [method] about changing future performances.

01:24

And that [approach] will preserve their positive mindset while also talking about what will improve the quality of their future performances.

01:24

So we want to focus on the top two to three most impactful changes that the learner can make or opportunities that they have. And we want to tell them what to do to make that change, why that change is important, and how to go about making that change.

L-Share Your Learning Discoveries

Time: 2m20s

Our coaching can be very different depending on the mindset we use when analyzing the performance. When we approach coaching as an opportunity to help and to learn, we do our best work. We can honor the performer by being open to learning from them. This changes the feedback because we're not hunting for deficits or gaps, but true positive contributions. It also helps us stay humble and to preserve authentic regard for our students.

Share one or two learning discoveries from your coaching with the learner. Help the performer understand how you were impacted by what they did. This reinforces their development of self-confidence and self-efficacy.

- As you review the performance, seek to learn from it and from the performer
- Select from this list the one or two learning discoveries that are appropriate to share
- Present these discoveries with recognition of the performer's contribution
- Thank the performer
- Record all your learning discoveries to contribute to your development as a coach

Video (1m24s)

Watch on youtube: <https://youtu.be/W5DKSofjfNM>

Video Transcript (1m8s)

00:00

While we're doing the solid portion of coaching, one of the things that's paramount is that we maintain that positive mindset about the learner that we're coaching.

00:11

And so one of the ways we do that is actually to share the learning that we're doing during our coaching, so that we are keeping an open mind, or a learner's mind, during the analysis of their performance. And that lets us be open to different ways of doing things that accomplish quality, so that we can recognize them as strengths and also seeing new ways ourselves. It keeps us very fresh and authentic, while we're doing the analysis, as well as providing the feedback.

00:46

So I try to share one learning that occurred, maybe two, but one key learning that occurred during the analysis of their performance so that I can demonstrate my own learning and I can give respect to the learner for what they have accomplished and changed in me.

01:01

And it's often a great boost to their confidence and their self-efficacy and allows them to move forward with the rest of the solid portion of coaching.



I-Implement a Learning Plan

Time: 2m15s

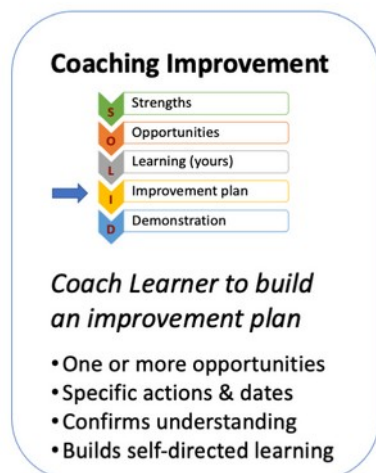
The strongest improvement plans will be those you coach the learner to develop. Why? Because the best learning plans are those that are followed and make an impact. By coaching the learner to identify what needs to be done to implement an opportunity develops their strength as a learner and ensures they've bought into the plan. The plan should be specific and time-bounded with a future date for the demonstration of improvement if the situation allows.

- Confirm the performer understands and accepts the feedback
- Invite the performer to suggest the improvement plan to strengthen their self-development skills
- Coach the planning to not only revise the deliverable but also to develop the performer's skills
- Verify the opportunities have been understood through the content of the plan
- In written feedback, ask the performer to send you a plan that you could coach

Video (1m19s)

Watch on youtube: <https://youtu.be/lxIADZtT3A4>

Video Transcript (1m)



00:01

After you finished your feedback on the S, O, L, or SOL portion of coaching in SOLID, it's time to do the improvement conversation. Now that can happen interactively or it can happen via email or some other form.

00:19

But the goal is to have the learner build an improvement plan and to take responsibility for that. several reasons for that. One, it builds our learning skills to it confirms that they have understood your coaching or it gives you an opportunity to explain what it is you really meant. And as you go along, that you want to see which opportunities they've embraced, how they're approaching them, the actions and dates that they have around it, and really, if you can reinforce those learning skills that they're using in a mini coaching so that they're getting the reinforcement on those as well.

01:10

And this will lead to a much better improvement process for the student.

D-Demonstration of Development by the Learner

Time: 1m30s

End the coaching feedback by setting a future date for demonstrating the improvements and/or submitting the assignment.

- Confirm the date and method of demonstration; in written feedback, propose the date and method and ask for confirmation
- Invite the performer to clarify any aspect of the coaching prior to the demonstration
- For complicated improvements or for learners who need more accountability, ask for intermediate deliverables and set a reminder for yourself to follow up
- Close the feedback by expressing confidence in the learner to implement the plan

Video (47s)

Watch on youtube: <https://youtu.be/hX8Ko8fP5-A>

Video Transcript (45s)

00:01

You're now at the end of the SOLID process. And all that's left is to really emphasize to the learner that you are going to be asking them to demonstrate

their learning at a future date. It could be turning the assignment back in or it could be making their performance.

00:19

But what that does is it reinforces that you expect them to follow the plan, maintain forward progress, and still have some control because they can actually tell you when they're going to be ready. And then what that does is reinforce that idea of personal accountability and ensure that it's going to come back around and let you verify that the [learning] improvements have been made.

Demonstrating Learning

- S Strengths
- O Opportunities
- L Learning (yours)
- I Improvement plan
- D Demonstration

Set date & time to coach a new, improved performance

- Learner follows plan
- Maintains forward progress
- Invite learner's control
- Create personal accountability

Photo by Vidar Nordli-Mathisen on Unsplash

Coaching Checklist

Check or Rate yourself on each of the following items when coaching a significant performance.

Prepare to Coach		
?	Area	Coaching Checklist
<input type="checkbox"/>	Coach's Mindset	I believe everyone can learn through kind, effective coaching and I practice to improve my skill;
<input type="checkbox"/>	Coach's Mindset	No matter what the quality, I know any performance can be improved
<input type="checkbox"/>	Relationship	My feedback is more effective because I've established a positive and trusting relationship with the performer and demonstrated genuine caring
<input type="checkbox"/>	Objectives	I determine the purpose of this coaching instance and share it with the performer
<input type="checkbox"/>	Checklist	I determine what evidence I need to collect and then find or develop a checklist that balances coaching of the process and the results; I share the checklist with the performer as early as possible in the learning cycle
<input type="checkbox"/>	Know the facts	When I want to coach a performance, I first collect the evidence I need, measure its quality, and analyze it to understand what produced its level of quality. I deliver the feedback to the performer, strengths first, improvements second, and anything I learned, third
<input type="checkbox"/>	Performer's Mindset	I do not judge the performer during my analysis or writing my feedback, because my only goal is to improve future performances; instead, I focus on improving the skills and process the performer used
Deliver the Coaching Feedback		
?	Area	Coaching Checklist
<input type="checkbox"/>	Performer's Mindset	During feedback, I avoid mistakenly signaling any judgment, verbally or nonverbally
<input type="checkbox"/>	Strengths	I choose the two or three most important strengths and explain what makes them strong
<input type="checkbox"/>	Opportunities	I choose the two or three most impactful improvement opportunities that could be made by the performer, and describe how to make them
<input type="checkbox"/>	Learning	I role model learning by explaining one or two of my own discoveries made during a coaching session
<input type="checkbox"/>	Implementation	If possible, I verify that the performer has understood the feedback by asking how they plan to implement
<input type="checkbox"/>	Implementation	Performers become stronger learners when they can plan their own learning through self-coaching, and I coach their implementation planning to strengthen it further
<input type="checkbox"/>	Demonstration	If possible, I follow-up in future coaching sessions to notice and comment on improvements; setting a date with the performer enhances commitment, especially when expressing confidence in the performer's ability to learn and develop
<input type="checkbox"/>	Self-coaching	I coach my own coaching by getting feedback on my coaching and use it to improve my skills and results

SOLID Coaching Form

Use this tool to assess a recent performance for improvement. Use the **Checklist** to guide the quality of your coaching. You may find it easiest to copy-paste the following into a document for each coaching that you do. Using this form creates a record that allows you to improve your coaching.

Strengths

- Strength 1
- Strength 2
- Strength 3

Opportunities

- Opportunity 1
- Opportunity 2
- Opportunity 3

Learning Insights

- Discovery 1
- Discovery 2
- Discovery 3

Implementation Plan

- Step 1
- Step 2
- Step 3

Demonstration of Improvement

- Means to demonstrate
- Date of demonstration

Method to Establish a Positive Relationship

A facilitator-coach may establish a positive and trusting relationship through actions based on the following principles (Apple et al., 2016; Leasure, 2020):

1. **Reliable** - Deliver on your promises—maintain positive and trusting relationships; use the [Trustworthy Checklist](#) (opens in a new tab or window) to self-coach your mindset and behaviors
2. **Relatable** - Make personal connections—learn and use everyone’s name when you communicate; discover their dreams, key experiences, and current situations through conversation, office hours, and discussion posts
3. **Respectful** - Start with no prejudging—do not express negative statements about your students and be open to discovering and accepting who they are
4. **Responsive** - Respond within a day of receiving an email and within four days for written assignment feedback; all of us appreciate a quick response and feel it represents caring
5. **Affirming** — be encouraging, express your belief in their potential, value them as persons, and care about their success
6. **Growth-oriented** - Explain growth mindset and support it by demonstrating that each mistake, failure, or other setback is an opportunity to improve, especially through modeling self-coaching and through coaching your students
7. **Belief in All Learners** — express that you believe in each person’s ability to learn and succeed given personal motivation, hard work, and persistence
8. **Empowerment** - tell students you will coach them to continue improving their performance, skills, and mindsets to empower them to succeed
9. **Shared Commitment** — facilitate learners to find their personal reason to do what it takes to succeed in the course and reaffirm your commitment to support their success

Method: Know the Facts of a Performance

Time to read: 2m15s

If you find a performance more challenging to analyze, use the following method, based on D. Elger's *framework for performance* (Apple et al., 2016, p. 31), to tease out the contributions and hinderances to both a planned and observed performance.

As a coach, use this method before a performance by a group of learners to identify critical aspects of the expected performance. After a performance, you can use the initial analysis to accelerate the coaching process.

As a learner, use this method to prepare for a performance ahead of time, making sure you've covered the learning and practice you need.

- **Expectations**—Describe the expected performance, in sufficient detail. Often the assignment description suffices.
- **Knowledge**—What knowledge is required? Does the performer have it? Did the performer recognize the need for the knowledge? Did they acquire it? A *yes* answer to any of these questions could be a strength, if significant enough. Conversely, a *no* answer may represent an opportunity if the need was sufficiently limiting.
- **Skills**—What skills are needed or helpful to a quality performance? For newly acquired skills, were they used or did the performer fall back to older methods, as often happens under stress? Did the performer adapt an existing skill or use a skill particularly well?
- **Ways of Being**—what roles and values are required for a quality performance? Did the performer exhibit them? Did the performer act in accordance or at cross-purposes with the needed way of being?
- **Context**—Determine the context of the performance. The context includes the performance environment, the resources, any unusual occurrences, complexity, time requirements, and constraints. Does anything about the context make it more or less challenging than is typical? Could recognizing any aspect of the context by the performer contribute to the quality of the performance (opportunity) or did the performer handle a challenging aspect well (strength)?
- **Personal State**—Did the performer deal with any temporary conditions within themselves? If not, did they get frustrated, angry, confused, or did they start the performance with some helping or hindering physical, mental, or emotional condition? If so, how did they handle it?
- **Fixed Limitation**—Did a fixed limitation interfere with the performance, such as insufficient strength or height? Was the performer aware of it and could they have planned an accommodation to overcome it? This can be a sensitive area, so carefully and non-judgmentally describe the situation and strength or opportunity. Questions lead to better coaching in this area than assumptions and statements.
- **Assessed Quality of the Performance**—Locate the checklist or rubric that describes how the performance can be done and quality expected for the result.

Know the Facts Form is a blank version of the method you can use to record your analysis.

Frequently Asked Questions about Coaching Assignments

Coaching Numerous Errors

What if a student's paper has lots of mistakes in grammar, punctuation, spelling, or word choice? Am I limited to three opportunities?

Use track changes to mark some, but not all such errors, and bundle them into one opportunity, to save room for other types of opportunities. If the errors cluster into certain types, then you can address them first as improving their proof-reading skills and second as identifying and correcting all the instances of such mistakes.

Here's an example:

- Cyril, strengthen your proof-reading to catch typos and other mistakes; for example, read your work aloud to another person and ask them to mark what doesn't sound right, or you could let your paper sit overnight and read it fresh in the morning; in this case, you could work on the subject-verb agreement ([link to resource](#)) and the comma-spliced sentences ([link to resource](#)); please find and improve all such patterns in your paper to make it easier to read and to improve the trust the reader has in your words.

Coaching vs. Grading

When do I coach and when do I grade? Are they the same?

Coaching is providing welcome and impactful feedback to improve the quality of future performances. One author even calls it “feed-forward”.

Grading is evaluating a student's work and determining what level of quality it represents. Ideally, the two are separate, but often, we must provide feedback and a grade simultaneously. In that case, start with the feedback and incorporate the grade in the implementation and demonstration steps.

Here's an approach:

- [I] Cheryl, your work, as you've just seen has both strengths and opportunities to improve. For that reason, I've marked your work as a B. By implementing the opportunities with care, you will build on the strengths already present in your work and may be able to elevate your grade.
- [D] Please summarize the changes you want to make and I'll give you some feedback on your plan. Do that quickly so you have time to resubmit your work within x days.
- [second R] I have faith that you can do these improvements and want to support you. Tell me what you'd like me to do or seek the help of the tutoring center.

Misses an Assignment

My student failed to turn in an assignment. How do I coach that?

If the student has made no effort on an assignment or misses it completely, you don't have an assignment coaching situation, but rather a deeper problem. In this case, phone or zoom the student to find out what's going on and where the help is needed.

When you suggest a meeting, you can still attend to the relationship part:

- Shana, I am concerned that you did not submit an assignment (or did not submit a finished assignment). This isn't like you, so I'd like to find out what's happening in your life to see how you might recover from here. I will call you today at 3 p.m. to set up a meeting. We may be able to fix this if we act quickly. Feel free to call me at 999-999-9999.

Does Not Follow Directions

I've had students not follow some or all the directions, but still make an effort. How can I handle this?

Not reading or misreading the assignment instructions is one of the most common errors. If you're sure that the student hasn't plagiarized, then you can still honor the effort by noting strengths that did meet the assignment, and appreciate the effort made. Plagiarism is a different issue (see plagiarized assignment).

Address two things in your opportunities. First, cover how the paper could be improved by adding in the missing aspects. Second, develop the student's process for understanding the assignment by asking them to make a checklist of the requirements (unless you already provided one). The implementation and demonstration can include this component.

Plagiarism

My student appears to have plagiarized. How do I handle this?

The coaching philosophy applies. If you think the student plagiarized by omitting citations or failing to quote, and you believe they can learn to cite, quote, synthesize, and summarize, then you can coach them to repair their work.

After listing strengths, you could use a statement like the following to describe the opportunity:

- Smitty, summarize this section (labeled A) instead of making such a long quote without a citation. You could combine it with several other of the ideas you state from Jones, Smith, and Argyle. Then, please provide a proper in-text citation and an entry in the references.

It doesn't feel like you did this on purpose, but when you use another person's work like this, it's like stealing, and we call it plagiarism. I know you can fix this, and you'll actually add to the credibility of your work by citing and considering other's ideas.

If you don't learn to do this now, as you progress in your program, you may be accused of willful plagiarism. I want you to set an appointment with me if you need help making these changes. I will look for these fixes when you resubmit.

If, on the other hand, a student has clearly submitted a paper or project in whole or a substantial part, and you believe they did this knowingly, your institution has procedures for you to follow to ensure proper treatment of a serious charge.

When Not to Coach in Writing

My student has some challenges that I don't understand or find too hard to write about. Is it ok to request a meeting on the phone or zoom?

Usually, in each class you teach, you'll have a situation where coaching an opportunity is too complicated to communicate in writing, either because you don't have all the facts or you're not sure whether the student would understand. Sometimes it's a non-academic problem inserting itself, such as a personal issue or conflict between students. In any of these complicated cases, you can get more information by setting up a conversation and create better feedback by targeting it to the actual problem.

Glossary

A

academic relationship

a relationship between a facilitator-coach and a learner that is based on trust, caring, and commitment to supporting the success of the learner through the development of the learner's capabilities

actionable feedback

feedback given in a way that preserves an open, listening attitude on the part of the performer, and is sufficiently detailed and clear to the performer that it may be followed

assessment

a non-judgmental analysis of a performer's performance done for their benefit; the analysis seeks to identify the strengths to repeat, the opportunities to improve, and the learning discoveries made during assessment; the analysis is then developed and delivered as feedback by a coach; the assessment is supported by a checklist or rubric

assessor

a person, usually a facilitator or coach, who performs a performance assessment

C

checklist

a list of qualities and functions that help a performer plan, do, and check one's performance; a coach and performer share the checklist to align their expectations and to guide, but not limit, the coaching

coach

to assess a learning performance and analyze what to repeat (strengths), what could improve and how (opportunities), and co-create meaning with the performer (learning discoveries), and deliver feedback that is welcome, future-oriented, and impactful.

coaching

"optimization of unrealized potential through development of talent and refinement of effective skills from unsatisfying, limited (average) performance to enhanced or outstanding effectiveness" (Orlinsky, 2007)

coaching mindset

a person's mindset consisting of the belief that all people, given the right support, can learn and develop the skills for learning; desires to coach others with caring, helpful support; and seeks to continuously develop their own abilities and skills

coaching problem solving

an approach to coaching that seeks not to solve a problem for the performer, rather it helps

the performer become a better problem solver so they can resolve this and future situations

cooperative learning

a form of collaborative learning where students work together to support their individual learning; five elements are required: “positive interdependence, individual and group accountability, promotive interaction, appropriate use of social skills, and group processing” (Johnson & Johnson, 1989, 2008)

counseling

A licensed profession separate from coaching that seeks to provide “the solution of troubling problems through resolution of dilemmas and improvement of strategic coping from frustrating, impaired (inadequate) adaptation to competent or normal adaptation” (Orlinsky, 2007)

E

equality in education

the condition where students are all treated the same and have access to similar resources. (Center for Public Education, 2016)

equity in education

the condition where students receive the resources they need to be prepared for success after they graduate. (Center for Public Education, 2016)

evaluation

a judgmental analysis of a performer’s performance done to make a decision; the analysis measures the quality of the performance and compares it to a set of standards that drive the decision; examples are certification, licensure exam, calculating a raise, awarding prizes, or grading of an assignment; most people are sensitive to feeling judged and may become defensive, even to the extent of triggering the fight-flight response

F

facilitating

making learning more effective by focusing on instilling learning ownership, enhancing motivation, setting challenges, and developing skills while removing barriers for a group of learners

facilitator-coach

an instructor who facilitates group learning as well as coach individual development.

L

language of deconstructive criticism

a mindset of coaching that assumes that the coach does not hold all of the answers; this mindset preserves the learner's ownership of learning and encourages learning to continue beyond the scope of the feedback (from [Keagan & Lahey, 2001](#))

language of on-going regard

giving feedback to learners that is direct, specific, and non-attributive, since it is more sincere, personal, and has the potential to be transformative; it replaces the language of prizes and praising that is unhelpfully vague, not given directly, and attributes a quality to an individual and not their actions (from [Keagan & Lahey, 2001](#))

learner-centric model

a framework placing the learner as the person responsible for learning supported by their personal capabilities, faculty in specific roles, and institutional services, all performed in the learner's personal and professional context

learning discovery

a discovery made during a performance assessment through the awareness of a coaching mindset of a novel, interesting, pleasing, or useful insight that was not known to the assessor/coach prior to the assessment

M**method**

a method is a listing of the steps that will guide a learner through a process; as the performer applies the method in a variety of different contexts, the learner internalizes the method and elaborates it as their own internal process

O**opportunity**

a result of assessment that takes into account the performer, the performance, and the checklist to determine what would most improve a future performance that is within the performer's current capability to learn (zone of proximal development), and includes sufficiently specific steps that the performer can take to improve their future performances

P**performance**

any activity that is intended to product value can be thought of as a performance; examples include cooking a meal, reading a chapter for learning, writing a paper, configuring a network, acting in a play, and coaching

positive relationship

a quality of a relationship in which the individuals matter to each other and the association enhances productivity within a person's life

problem-solving

"the process of finding solutions to difficult or complex issues" (retrieved 1/15/2020 from www.lexico.com)

R**role**

a way of being that guides and constrains interaction for a specific purpose; a more general term than professional identity

S**strength**

a result of assessment that determines the most impactful actions by a performer contributing to the quality of performance that should be repeated in future performances and includes sufficiently explanatory description to allow the performer to be aware of these actions during a performance so they may be deliberately repeated in future performances

T**teach**

to develop learners according to a curriculum through the combined action of facilitating, coaching, and evaluating learning

trust

from Covey & Merrill ([2006, p. 5](#)): "...trust means confidence. The opposite of trust (aka distrust) is suspicion. When you trust people, you have confidence in them—in their integrity and their abilities."

WOOP + SOL Method for Implementing Personal Change

Change can be difficult. Even with a strong desire for the result, personal change can be even more difficult. Using WOOP+SOL to plan and implement your change will make it much more likely to happen.

You can watch the video or read the transcript.

Video (8m30s)

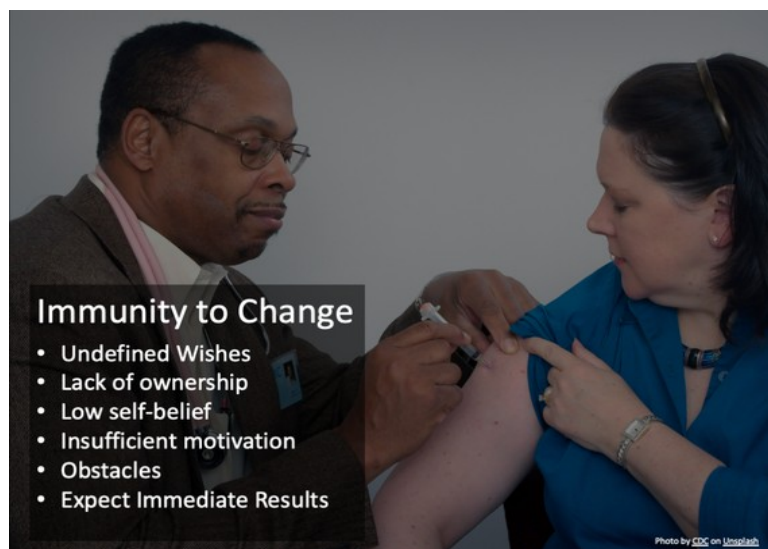
Watch on youtube: <https://youtu.be/NDY-O6bznSM>

Transcript



Hi, have you ever really wanted something, some change in yourself, and you wanted it really bad but you didn't know how to get it, or you thought you did, and you tried, and it didn't work out? After a while things just sort of fizzled. I'm going to show you a method today called WOOP+SOL (whoop soul). And it's a way of doing personal improvement planning that's part of our rock solid coaching tool chest.

Slide 2

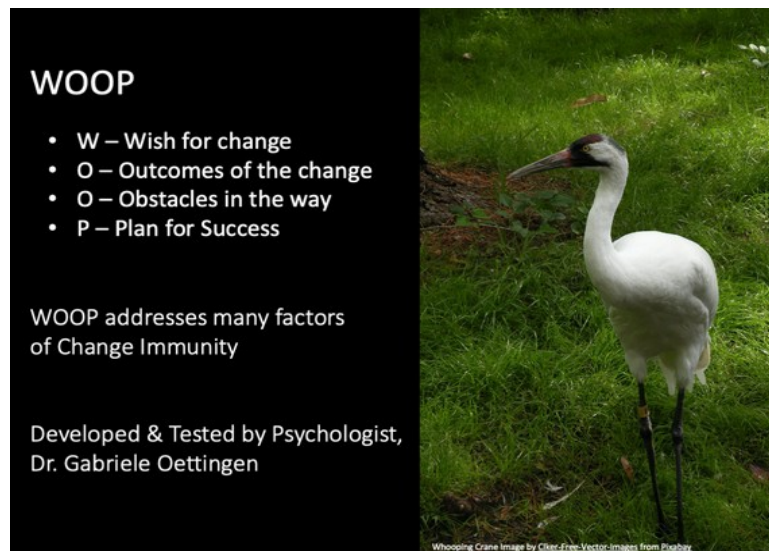


Most of us have immunity to change. And often, that's because our wishes aren't all that well defined. Or we want something but we're not willing to take the ownership that is required to

get it. We have low self belief in ourselves, oh, I couldn't do that. I really would like it. But I can't do that. Insufficient motivation? Well, it'd be nice. But yeah.

A lot of times, it's a question of what are we really willing to sacrifice to give up? And what obstacles will be in our way that stop us from doing that? And am I going to have the appropriate expectations of myself, and of the time that it actually takes to make that change? "You know, I'd love to lose 50 pounds, but it's not going to happen by next week. So I may as well quit." Hmm, not going to work, is it?

Slide 3



WOOP

- W – Wish for change
- O – Outcomes of the change
- O – Obstacles in the way
- P – Plan for Success

WOOP addresses many factors of Change Immunity

Developed & Tested by Psychologist, Dr. Gabriele Oettingen

Whooping Crane Image by Clara-Fran-Vector-Images from Pixabay

So what's WOOP? This is two parts: WOOP and SOL. WOOP is the planning and analysis part: getting ready to make the change. And it starts with a wish for change. And we want that wish to be something that we have happen; we have the benefits or the outcomes of that change, the obstacles in the way of making that change, and our plan for success, which includes overcoming those obstacles.

This is designed to overcome those many factors of change immunity. And it's actually been researched and tested by a group of psychologists including Dr. Gabrielle Oettingen.

Slide 4



W—Wish

Identify a serious wish

- Something to change or achieve
- Worth sacrificing time, money, & other opportunities

Write it down

Image by truthseeker08 from Pixabay

So what's a wish? It's a serious wish, I really want to change this something to change or achieve. And something that's worth sacrificing either your time, your money or even other opportunities, because you're going to have to focus on it, if you really want it to happen. It's like they say "careful what you wish for," make sure it's something you really want. And then, when you are certain about that, write it down! Writing it down makes a huge difference on whether we actually create intention, psychologically, to achieve this.

Slide 5


O—Outcomes

Identify the positive results

- What are they?
- How do they feel?
- How important are they?

Visualize & connect to Wish

Ink it, don't just think it



Then you can go on to the outcomes, identify the positive results of achieving your wish. What are they? How do they feel? How important are they? Is it just for you? Or is it for your family? Is it going to make more money? What is the benefit of achieving that so that you know what it's worth to you. And that way you can judge what you're willing to sacrifice. And then again, write it down, we say "ink it don't just think it."

Slide 6

Obstacles

What prevents Change?

- Socializing/ Entertainment
- Conflicting Priorities
- Pain, Effort, Illness
- Social Media, Gaming
- Caring for Others
- Incorrect Assumptions
- Un-productive Habits
- Low self-efficacy

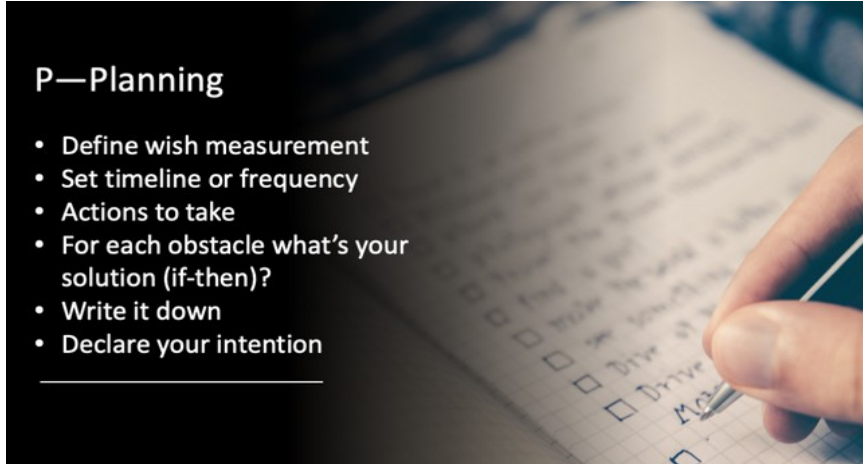
What will you do about it?



Now you can come up against obstacles. So what prevents change, socializing, entertaining yourself. conflicting priorities, too many priorities. The pain of it, the effort of it, maybe you get sick. Maybe that slows you down. Maybe you get distracted by social media and gaming. Or you have a responsibility to care for others. It's not wrong, but it might be an obstacle that would slow you down. Unproductive habits, like maybe you just come home after work, turn on the TV. Not a great habit for getting a change done. Or you have low self-efficacy. Maybe you

just don't believe in your ability to do this. You have a lot of negative self-talk. Well, that's something you need to become aware of, and then make a plan to overcome it. And that's the last question for each of these obstacles, you want to ask yourself, What will I do about it?

Slide 7



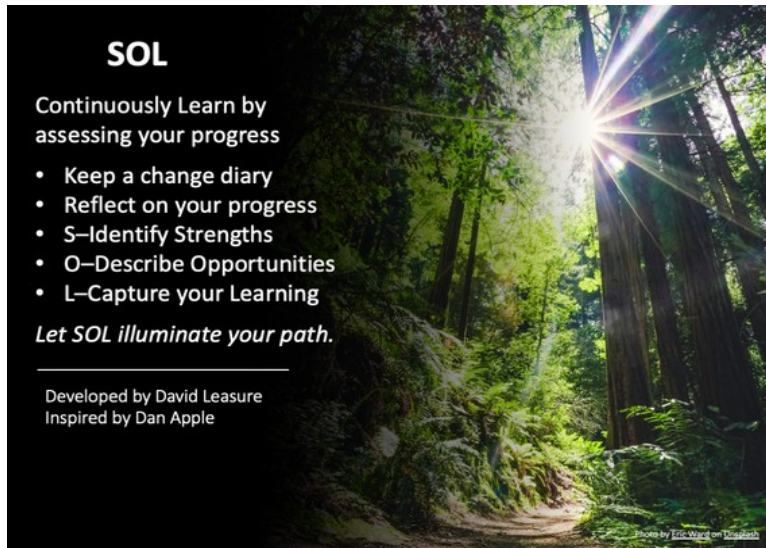
P—Planning

- Define wish measurement
- Set timeline or frequency
- Actions to take
- For each obstacle what's your solution (if-then)?
- Write it down
- Declare your intention

Planning. So how will you know if your wish is achieved? What has to be true? How will you know if you're making progress on your wish? With something like weight loss? It's pretty easy: you set a goal, number of pounds, and then your progress is the number of pounds you lose toward that goal. And then you set a timeline or a frequency, how often am I going to measure and when am I going to be done, and what milestones should I expect to achieve along the way, you want to make this as complicated as it needs to be, but really as simple as possible. You want it easy for you to do, since if it's a pain just to do the planning, and the measuring and everything like that, you also will find that to be an obstacle.

So write down the actions you want to take. For each obstacle you identified, what's your solution? "If this happens, if I come home, and I find myself really tired, and I just want to sit down and watch the news, what am I going to do? Well, maybe I'll go out and take a walk." So if this happens, then I'll do this. Then write it down, write it down for each and every one of them. This is called declaring your intention. And that will help you get it done.

Slide 8



SOL

Continuously Learn by
assessing your progress

- Keep a change diary
- Reflect on your progress
- S—Identify Strengths
- O—Describe Opportunities
- L—Capture your Learning

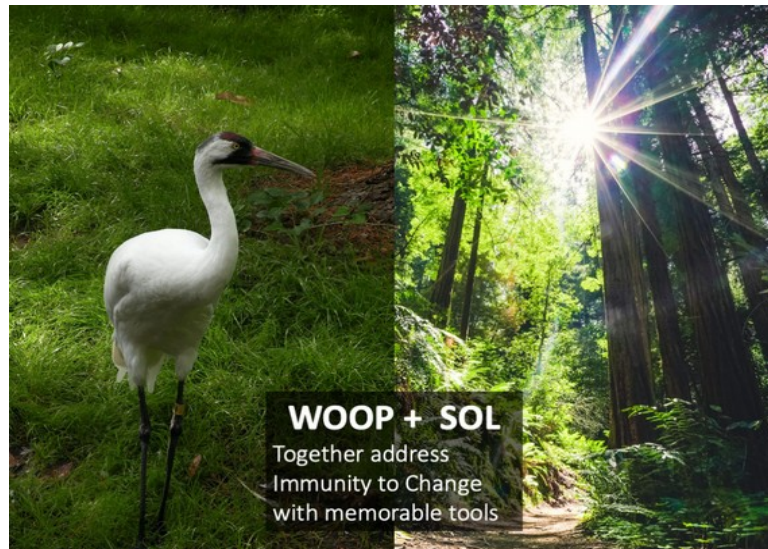
Let SOL illuminate your path.

Developed by David Leasure
Inspired by Dan Apple

Now, there's another part to this that they didn't cover in the [WOOP] research, but from other research we know is true, which is you need to continuously assess and learn about yourself and your progress. Often, what's hardest for us is we think we know what the actions are we

need to take, but we don't have a good idea of our own psychology of our own emotions and feelings. So we learn about those by engaging in the activities (or not). And then stepping back and reflecting and understanding what we did well, what we could do better. And what we've learned along the way, and we call that S, O, and L or SOL, which is strengths, opportunities and learning. And if you do this frequently enough, then you'll learn about all the things that are stopping you from getting it done, and you'll learn what's helping you get it done. And you'll concentrate on both as you go forward. So as we say, let SOL illuminate your path and be willing to adapt.

Slide 9



WOOP and SOL together, address the immunity to change with an easy to use tool. It's memorable and we wish you best progress; may you flourish.